Pension and fiduciary service

PMC VSR Intermediate Core Course
Phase 5.1(d): Beyond Basic Development
**Process Veteran-Married-to-Veteran Cases**

Trainee Guide

January 2025

Process Veteran-Married-to-Veteran Cases

Lesson Overview

| Topic | Description |
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| Time Estimate: | 1 hour |
| Purpose of the Lesson: | This lesson is part of the entry-level curriculum Core Course for PMC VSRs. The purpose of this lesson is to prepare you to calculate the pension rate when a Veteran is married to a Veteran. |
| Prerequisite Training Requirements: | Prior to taking the Process Veteran-Married-to-Veteran Cases lesson, you must complete PMC VSR Core Course Phases 1–4 and Phase 5, Part 1.a-c.  |
| Target Audience: | This lesson is for entry-level PMC VSRs. |
| Lesson References: | * VA Form 21P-527EZ, Application for Pension
* M21-1 IX.iii.1.E.1.c. (Determining the Monthly Rate of Pension Payment)
* M21-1 IX.iii.1.E.3.a. (Combined Rate Payable to Veterans Married to Each Other)
* M21-1 IX.iii.1.E.3.b. (Award Procedures in Veteran-Married-to-Veteran Cases)
* M21-1 IX.iii.1.E.3.c. (Determining the File Number to Use in Combined Awards)
* M21-1 IX.iii.1.E.3.d. (Estranged Married Veterans)
* M21-1 IX.iii.1.E.3.e. (Mandatory Election from Protected Pension in Veteran-Married-to-Veteran Cases)
* M21-1 IX.iii.2.B.2. (Making Payments in Veteran-Married-to-Veteran Pension Cases)
* 38 CFR 3.23 a(4) (Improved pension rates—Veterans and surviving spouses)
* 38 CFR 3.31 – Commencement of the Period of Payment
* **Common VA Terms** job aid
* **Veteran-Married-to-Veteran** job aid
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| Technical Competencies: | * Program Benefits and Eligibility (PMC VSR)
* Processing Claims (PMC VSR)
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| Knowledge Check | Phase 5.1(d): Veteran-Married-to-Veteran Knowledge Check |
| Lesson Objectives: | At the end of this lesson, given the training and references, the learner will be able to do the following * Identify Veteran-married-to-Veteran cases
* Calculate the award payment for a Veteran-married-to-Veteran claim
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| What You Need: | * Trainee guide
* Access to VBA intranet
* Pen and paper or access to a whiteboard
* Appendix A – Vet-Married-to-Vet Worksheet
* Access to the following systems:
	+ SHARE
	+ VBMS
* Access to completed electronic versions of the following VA forms:
	+ VA Form 21P-527EZ
* Access to the following job aids from VSR Assistant:
	+ **Common VA Terms** job aid
	+ **Veteran-Married-to-Veteran** job aid
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| PowerPoint Slides | Notes |
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| **Process Veteran-Married-to-Veteran Cases** |  |
| **Lesson Objectives** At the end of this lesson, given the training and references, the learner will be able to do the following: * Identify Veteran-married-to-Veteran cases
* Calculate the award payment for a Veteran-married-to-Veteran claim
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| **Why This Matters!*** When a Veteran marries a Veteran, and both receive VA benefits, VSRs must be aware of the regulations that are used when awarding VA benefits​
* If one spouse in a Veteran-married-to-Veteran case dies, the surviving Veteran may be entitled to Survivors Pension ​
* A Veteran may receive only one benefit, either Veterans Pension or Survivors Pension​
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| **Definition of Veteran-Married-to-Veteran Claims?** * Veteran-married-to-Veteran claims are two awards combined, unless otherwise requested
* A special combined maximum annual pension rate (MAPR) applies to Veterans who are married to each other
* The combined rate is the same as it is for a Veteran with a dependent, unless both Veterans are eligible for SMP
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| **Example: Vet to Vet on VA Form 21P-527EZ** |  |
| **Award Calculation**For a Veteran-married-to-Veteran case, use either file number to establish a combined award, except when one spouse is A&A or housebound.  In those cases* establish the award under the file number of the Veteran who is A&A or housebound
* enter the names of both Veterans on the first address line if awarding benefits in a combined award, and
* cross-reference the two ***Veterans married to each other’s*** claims folders
 |  |
| **Example: SHARE Screen Vet-to-Vet** |  |
| **Veteran-to-Veteran: Authorizing Payments*** ​Authorize payments in a Veteran-married-to-Veteran case on a single award unless:​
	+ one spouse requests separate payment
	+ both Veterans have either aid and attendance (A&A) or housebound (HB) status, or
* a Medal of Honor award is involved
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| **PowerPoint Slides** | **Notes** |
| **Veteran-to-Veteran Claims: Separate Awards*** When establishing separate award payments for Veteran-married-to-Veteran cases:
	+ Cross-reference the two Veterans married to each other’s claims folders, and
	+ Inform the two Veterans married to each other that all pension benefits, including additional benefits for children or SMP, are equally divided
* When preparing separate pension awards for each Veteran, do not count the other Veteran’s pension amount as income for VA purposes
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| **Estranged Married Veterans*** In cases where two Veterans are married to each other but estranged:
* Apply the combined pension rate if one is making reasonable contribution to support the other
* Do not apply the combined pension rate where there is no contributing support
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| **PowerPoint Slides** | **Notes** |
| **Scenario—Calculate the Award****Scenario:*** Vet (A) SSA/mo. $950.00 = $11,400
* Vet (B) SSA/mo. $767.00 = $9,204
* Annual medical expenses (for both) = $30,000.00
* Both Veterans are rated A/A, DOC 10-12-21

What is the correct Monthly Pension Rate (MPR)? |  |
| **Scenario—Calculate the Award Answer** **Based on the information provided, what is the correct MPR?**  |  |

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| **PowerPoint Slides** | **Notes** |
| **Demonstration—Process a Veteran-Married-to-Veteran Claim**Instructions:* Access Claim
* Access the **Veteran-Married-to-Veteran** job aid and M21-1 to complete the exercise.

Follow along as the instructor:* Calculates the award
* Adds the Veteran spouse as a dependent
* Confirms the general award
* Adds the flash indicating the award
 |  |
| Activity—Process Veteran-Married-to-Veteran Claims* Instructions:
	+ Divide into groups of three.
	+ Access Appendix A – Veteran Married to Veteran worksheet
	+ Access the **Veteran-Married-to-Veteran** job aid and Pension Rate Table to complete the exercise.
		- Use calculator when needed.
	+ Answer the question listed in the worksheet

**Time allowed: 15 minutes** |  |

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| PowerPoint Slides | **Notes** |
| Activity—Process Veteran-Married-to-Veteran Claims Rate1. In July 2021, a claim is received for two Veterans who are married to each other, and one qualifies for A&A benefits, what is the MAPR?
2. On November 30, 2020, a claim is received for Veterans married to each other, and neither qualifies for A&A or HB. Veteran A receives a monthly check for $700 from SSA, and Veteran B receives a monthly check for $650 from SSA. Medical expenses were not reported. They have requested separate checks. Explain the IVAP, MAPR, and the award.

In September 2019, a claim is received for two Veterans who are married to each other, and one qualifies for A&A benefits, and they have one dependent child, what is the MAPR? |  |

| PowerPoint Slides | Notes |
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| **Knowledge Check: Lesson Summary Review Questions****Time Allowed: 10 minutes** |  |
| **What’s Next*** Complete TMS Evaluation Process Veteran-Married-to-Veteran Cases using **(TMS#** **4408446)**
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